

VITA Grant Final Report Requirements

The final report must be filed by September 30, which is 90 days after the project period ends (June 30). The report should be emailed to your assigned grant officer no later than the due date. All grantees regardless of the grant amount or multi-year status are required to file **all components** listed.

1. Narrative
2. Performance Progress Report - Performance Measures, Standard Form –PPR-A
3. Budget Detail Explanation
4. Final Site Listing
5. Financial Status Report (filed electronically in the Payment Management System)

Narrative

The narrative should focus on how your organization was able to implement the VITA Grant Program and achieve the following VITA Grant Program objectives:

- Enable the VITA program to extend services to primary and secondary (the underserved) populations in hardest to reach areas, both urban and non-urban;
- Increase the capacity to file returns electronically;
- Heighten quality control;
- Enhance training of volunteers; and
- Improve the accuracy rate of returns prepared at VITA sites.

The narrative is limited to five pages and must be typed, 12 point font, double-spaced, and numbered to correspond with the six questions indicated below. Please label all attachments and limit to the critical few.

1. Identify any issues that hindered you from serving your primary and secondary populations specified in your program plan. If you were unable to meet the minimum federal returns expected as outlined in your grant agreement, provide an explanation as to why and be as specific as possible.
2. Identify efforts to increase electronic return preparation and any reasons that hindered your organization from increasing your e-file percentage over the previous year's results.
3. Identify the publicity methods used to reach your primary and secondary populations. Provide a brief assessment as to whether the publicity methods used enabled you to reach your return goals.
4. Identify processes and procedures you had in place to heighten the quality of site operations and to improve the accuracy of returns prepared at VITA sites.
5. Explain actions taken to enhance training of volunteers. Please include any additional training provided not mentioned in your original program plan.
6. Please provide any feedback on how IRS administers the VITA Grant program.

Performance Progress Report - Performance Measures, Standard Form –PPR-A

This form is used to report on your organization's performance. The grant requires that you report five measures and the other measures reported are based on the information submitted in your application package and/or required by your organization. This form is available on irs.gov at

http://www.irs.gov/file_source/pub/irs-utl/sf-ppr-a_perf-measures.pdf. It should be **saved** to your computer, which will enable you to complete and save the form.

Standard Form PPR-A – Basic Field Explanations	
Field	Response
1. Federal Agency and Organization Element to Which Report is Submitted	Enter IRS/Grant Program Office
2. Federal Grant or Other Identifying Number Assigned by Federal Agency	Enter your unique grant number (federal award identifier), e.g., V14010 .
3a. DUNS Number	Self-explanatory
3b. EIN	Self-explanatory
4. Reporting Period End Date	Enter 6/30/XXXX
A. Performance Measures	
(1) Measure Number or Label	Specific information is required by your grant for measures A-01 through A-05. SEE NEXT TABLE. If your organization established additional measures, please continue with A-06, A-07, etc.
(2) Objective/Goal Description	Brief description of objective/goal; for the first five goals A-01 through A-05, see the next table.
(3) Measure	Explanation as to what the goal involves and how it will be measured; for the first five goals A-01 through A-05, guidance is shown in the next table.
(4) Baseline	<p>Use prior year data for each measure if available.</p> <ul style="list-style-type: none"> • A-01 baseline is the number of federal tax returns prepared in the prior year and reported in the prior year performance section of the application. • A-02 baseline is the percent of e-filed returns reported in the prior year performance section of the application. • A-03 baseline is the number of sites operated in the prior year. • A-04 and A-05 baseline is applicable to prior year grant recipients and reflects returns prepared with primary and secondary focus characteristics specified in the final report. If your audience changed or your organization was not a prior year grantee, this may be left blank and explanation provided in the appropriate column.
(5) Target Year	20XX
(6) Project Target	<p>Indicate the project goals.</p> <ul style="list-style-type: none"> • A-01 is the minimum federal returns established in your grant agreement. • A-02 through A-05 should show the information by measure projected with your application.
(7) Actual to Date	Report the results of your activity
(8) Explanation	Explain if you did not meet project targets or if the measure is left blank. If additional space is needed, include in the narrative. Show calculations when required.

Accurate completion of this form is required for all grant recipients.

See the following chart for items your organization must report and the measures used to compile the information on the Standard Form PPR-A. **ORGANIZATIONS MUST REPORT A-01 THROUGH A-05 AS INDICATED BELOW.** Do not deviate on how the measure is calculated.

Standard Form PPR-A Required Measures		
Measure Number or Label (1)	Objective/Goal Description (2)	Measure (3)
A-01	Returns Prepared	Number of federal returns prepared; a return is counted only once.
A-02	Increased E-file	Number of returns e-filed divided by the total number of returns prepared. Show the calculation under the explanation.
A-03	Sites Opened	Number of sites opened to prepare returns. Do not count sites planned but not opened. For one day, events, ad hoc, or mobile sites, each location may be counted. Do not count multiple visits to a site location as difference sites. Count only once.
A-04	Returns Prepared for Primary Focus	Number of returns prepared with primary focus characteristic (low income, elderly, limited English proficient, Native American, rural or persons with disabilities) identified in your application.
A-05	Returns Prepared for Secondary Focus	Number of returns prepared with secondary focus characteristic (low income, elderly, limited English proficient, Native American, rural or persons with disabilities) identified in your application.

The above measures are required; however, additional measures may be added based on the goals/activities your organization proposed to monitor and report upon in the Program Measures section of the application.

Budget Detail Explanation

Update your proposed budget detail explanation spreadsheet to reflect actual federal fund expenses and matching funds provided by category. Additional information about use of the workbook can be found in the Publication 4671. The only difference between the budget submitted and this report is that this report shows actual expenses or match and not proposed expenses and matching funds. The final budget detail should reflect the actual items and expenses incurred during the program period. It should not have terms like estimated, future or to hire that were in the original/revised budget detail. Remember to change these terms and descriptions when updating from your original/revised budget.

Examples of descriptions and computations that should not be in the final budget detail include:

- To Hire – Generally found in Section A, Personnel. It should be replaced to show number of hires and position.
- Average hours per week – Generally found in Section A, Personnel, for donated services. For donated services, it should be replaced to show the actual number of hours worked, the position, and the hourly wage used to value their work. For instance, if individuals preparing returns are valued at \$19.85 per hour and individuals providing information technology support at \$26.15 per hour, two lines should be used to show the number of hours for each position by the value designated. Be sure time sheets support the number of hours and activities performed by the individuals providing volunteer services.

- Estimated based on prior year cost – Generally found in Section E, Supplies, and should be replaced with the actual cost for the purchases made (i.e., marketing, publicity, postage, supplies, etc.).

Final Site Listing

Review the revised site listing to ensure all sites shown opened. If additional sites were opened, add to the list; if sites did not open, remove from the list. This is your chance to demonstrate the reach provided to customers. If mobile sites are operated, be sure to list locations visited. Be sure to indicate sites that operated as virtual intake sites and facilitated self-assistance sites.

Financial Status Report

The financial status report is required to be completed and submitted within the Payment Management System by September 30, which is 90 days after the project period ends (June 30). It should include cumulative information for the entire project period – July 1 through June 30. **All grant recipients are required to complete this report regardless of the amount of the award.** Please refer to the instructions for completing this report in the section, Financial Status Report, under Payment Management System Reporting.

ALERT! Do not confuse this report with the Federal Cash Transaction Report (FCTR) that is filed quarterly. The Standard Form 425 is used to complete both the FCTR and Financial Status Report but different line items are required for each report.

Please remember to keep a copy of your submissions and documentation to support your final report. Questions about reporting may be directed to your assigned grant officer.